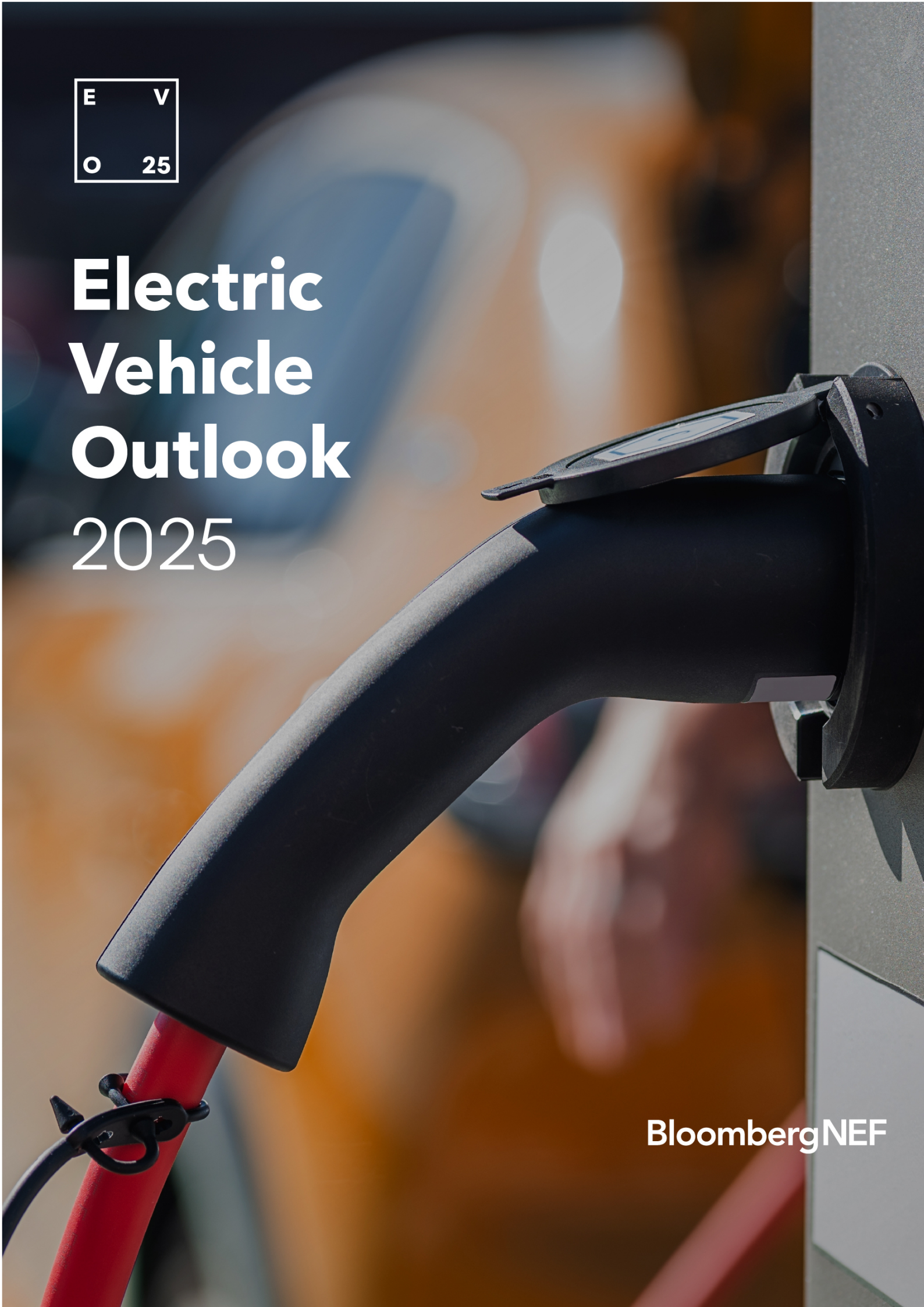

Electric Vehicle Outlook 2025

BloombergNEF

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Executive summary

Global sales of electric vehicles are set for another record-breaking year as costs of lithium-ion batteries fall and production of more affordable models ramps up. Plug-in electric vehicles are set to represent one in four passenger vehicles sold globally this year, and more than half of the market in China. This is a remarkable increase from just a few years ago when EVs represented less than 5% of global new vehicle sales.

The underlying technologies behind electrification continue to improve rapidly, and the latest generation of batteries offer better safety, performance and cost. This year's report goes into depth on the commercialization of solid-state batteries, which is now well under way.

The charging experience for consumers is also improving. Many national fast charging networks have doubled in size over the past 18 months. The first EVs able to offer recharging times competitive with gasoline or diesel refueling are now available, and new range-extended EVs – a variant of plug-in hybrids – are helping win over new buyers with different needs.

Electrification continues to spread quickly in other areas of road transport beyond passenger cars. Sales of electric trucks and vans are booming in China, while electric two-wheeled vehicles like scooters, motorcycles, and mopeds continue to gain share in other markets in Asia. More than half of city bus sales in Europe are now electric. The use of shared mobility is also rising again, and autonomous-vehicle services have been successfully commercialized in a few cities. Rides in these services are increasing sharply and the vehicles used are overwhelmingly electric.

Despite this, 2025 is the first year where we have reduced both our near-term and long-term passenger EV adoption outlook. Policy changes in the US are the biggest factor, with national fuel-economy targets being rolled back, supportive elements of the Inflation Reduction Act either being removed or under threat, and the potential removal of California's ability to set its own air-quality standards. Europe has also pushed back its near-term vehicle CO2 reduction targets.

Rising trade tensions and increased tariffs are also shaking up decades of closer integration in global automotive markets and making it more difficult to offer affordable entry-level vehicles. Policymakers face growing tension between environmental targets and other competing policy priorities, and as a result many automakers have reduced previously announced EV goals or quietly shelved them. Those effects are also flowing through to the battery supply chain, where the construction of plants is being delayed or canceled to better match supply and demand.

Against this increasingly complex backdrop, we are proud to present our 2025 Electric Vehicle Outlook, which examines each of the trends outlined above. The report also provides two updated scenarios for the future of road transport, drawing on BNEF's team of sectoral and regional experts around the world.

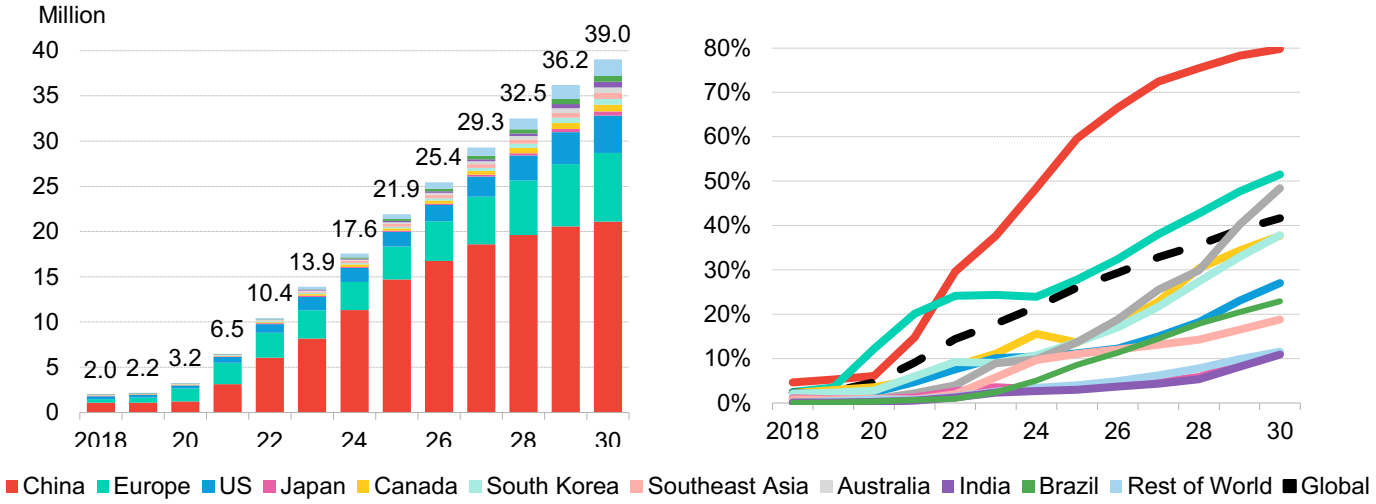
This report includes analysis of EV adoption in passenger vehicles, commercial vans and trucks, two- and three-wheeled vehicles, and in buses globally. It also looks at other drivetrains, including hybrids, natural gas and fuel cells, and explores the resulting impacts of all of these on electricity markets, oil demand, batteries and materials, charging infrastructure and CO2 emissions.

The key findings of this report are as follows:

- **Global EV sales are growing, but the national picture is more varied than ever.** BNEF expects almost 22 million passenger EV sales this year, up 25% from 2024. China accounts

for nearly two thirds of those sales, followed by Europe with 17% and the US with 7%. Sales are set to rise around 20% this year in Europe and will be relatively flat in the US. Meanwhile, EV sales in emerging markets are now growing quickly as Chinese automakers ramp up sales outside of their home country. This challenges a widely held assumption that EVs will start in wealthy countries before spreading further. Thailand now has higher EV adoption rates than the US, while Brazil is ahead of Japan.

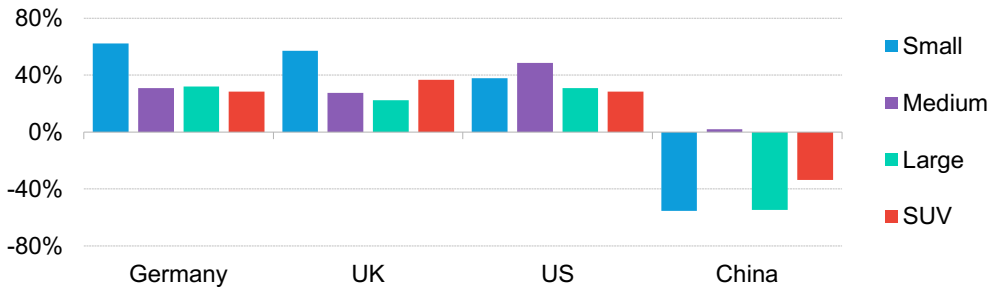
Figure 1: Global near-term passenger EV sales and EV share of new passenger-vehicle sales by market



Source: BloombergNEF. Note: Europe includes the EU, the UK and European Free Trade Association (EFTA) countries. Electric vehicles include battery-electric and plug-in hybrid vehicles.

- **China extends its lead over Europe and the US.** Global passenger EV sales rise from 17.6 million in 2024 to over 39 million in 2030 in this year's outlook. China accounted for 65% of all electric cars sold in 2024 and this rises to 67% in 2025. The EV share of global new passenger vehicle sales jumps to 42% in 2030, from 26% in 2025. China (at 80%) and Europe (at 52%) are above that global average by then, and some European car markets are moving even faster, with the Nordics at 90%.

Figure 2: Battery-electric vehicle price premium over combustion cars, 2024



Source: BloombergNEF, MarkLines, China Automotive Technology and Research Center.

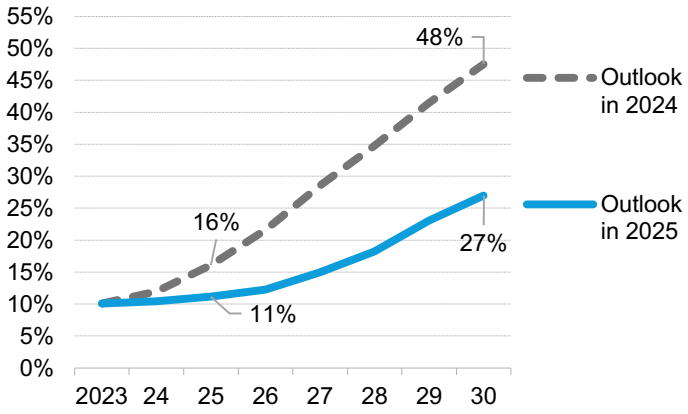
- Affordability matters too. China is the only large market where EVs are on average cheaper to buy than comparable combustion cars. International automakers without competitive EV models are struggling to compete in China and are being squeezed out of the market as

electrification takes over. China's electric vehicle market will be larger than the total US vehicle market within the next year.

- **The US passenger EV adoption outlook is now much lower as EV policies and support are being rolled back.** Passenger electric car sales in the US rise from 1.6 million in 2025 to 4.1 million in 2030 in this year's outlook, representing 27% of sales. This is significantly less than in our previous outlook and it results in cumulative EV sales between now and 2030 being 14 million units lower.

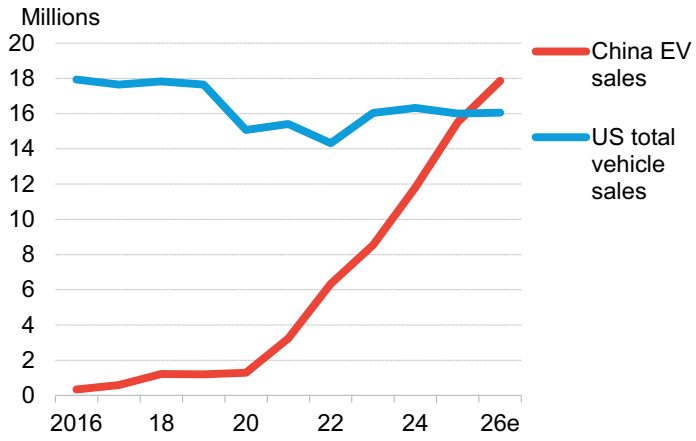
  Stable regulatory support still matters for EV adoption, and the announced roll-back of the federal fuel-economy standards, phase-out of the $7,500 EV tax credit, and reduced support for EV charging infrastructure all bring down the outlook for sales. Automotive import tariffs of 25% further slash the addressable market for EVs in the country. Our US adoption outlook assumes California retains its waiver supporting the Advanced Clean Car II program. This is a major uncertainty in our outlook and revoking the waiver would result in US EV sales falling further.

Figure 3: US passenger EV share of total car sales, outlook comparison – Economic Transition Scenario



Source: BloombergNEF. Note: Passenger vehicle sales

Figure 4: US total vehicle market compared to Chinese EV market



Source: BloombergNEF. Note: Includes passenger and commercial vehicles, and buses.

- **UK leads among major car markets outside of China.** The UK is now the leading EV market among large countries in Europe, ahead of Germany. Unexpected cuts to EV subsidies, mixed with automakers backtracking on their EV commitments, pushed EV sales in Germany down for two consecutive years. Support from the UK's Zero Emission Vehicles mandate combined with the country's relative openness to Chinese automakers boosts electric cars to 40% of all cars sold in the country by 2026. Other auto markets open to Chinese automakers – Australia, Thailand, Brazil and Turkey – continue to see strong growth in EV sales.
- **Range-extended EVs (e-REVs) in China are the fastest-growing drivetrain in the world,** with sales rising 83% in 2024 to 1.2 million. Sales are focused in the SUV segment and outside major cities in China among consumers with limited access to charging infrastructure. Automakers Li Auto, Seres and Changan dominate sales today, but Stellantis, Hyundai, VW and Ford have all announced plans to launch similar vehicles. These vehicles are a variant of plug-in hybrids but are used more like fully electrics, with average battery pack sizes of 39kWh, average electric-only range of 170km, and more than 70% of total kilometers driven

in electric mode. These vehicles overtake traditional PHEVs in China in the 2030s in our outlook.

- **Public EV charging costs are becoming an issue**. Most EV drivers today rely heavily on home charging, which is typically 20-60% cheaper than gasoline on a per-kilometer-driven basis and use of dedicated EV home charging tariffs can extend savings. But public fast-charging prices have risen sharply since 2022 in many markets in Europe and the US, pushing costs per kilometer above gasoline and likely discouraging some consumers from switching to EVs. We expect relative refueling costs to have a growing impact on EV adoption over time.

Figure 5: Relative cost of residential electricity compared to gasoline

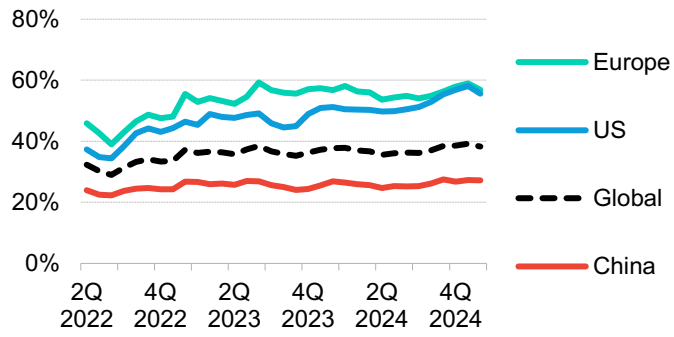
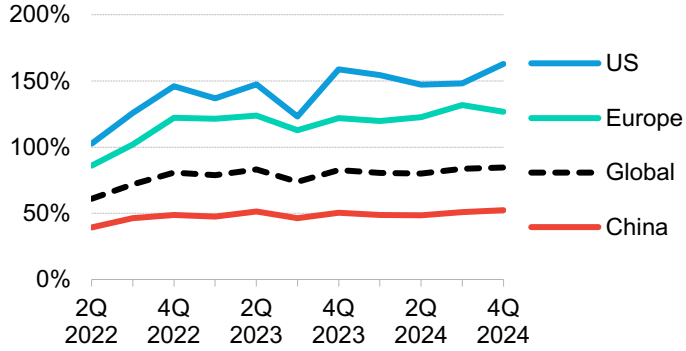


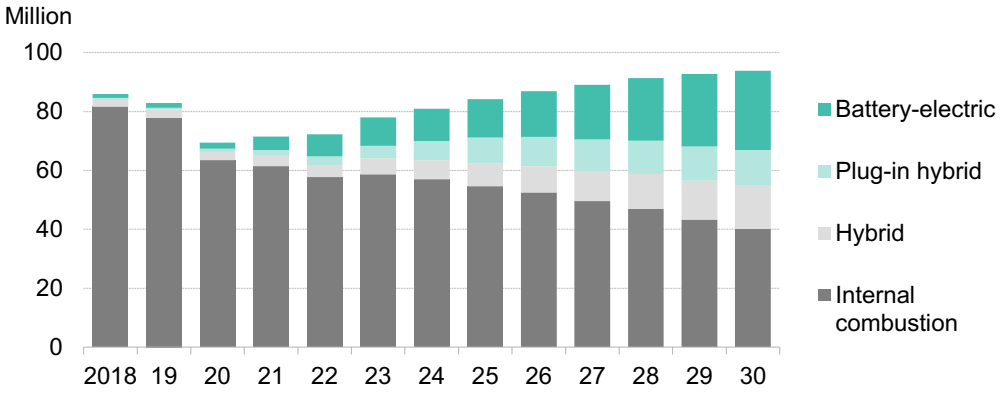
Figure 6: Relative cost of fast public charging compared to gasoline



Source: BloombergNEF, Eco-Movement, Eurostat, US Energy Information Administration, US Department of Energy, various government sources. Note: See Section 12.4 for assumptions.

- **Sales of internal combustion vehicles have peaked, and the fleet peaks soon.** Sales of internal combustion vehicles peaked in 2017. By 2030, sales of internal combustion vehicles are set to be 34% below their highest point in 2017. The internal combustion vehicle fleet reaches a plateau for the next few years before dropping from 2028 onward.

Figure 7: Global passenger-vehicle sales by drivetrain



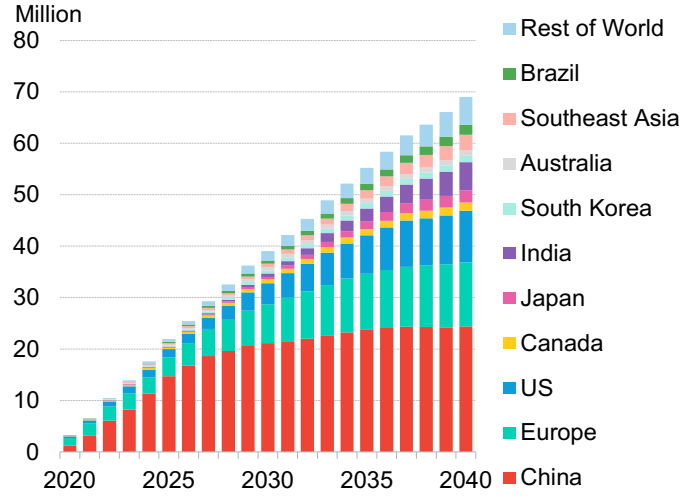
Source: BloombergNEF

- **Our long-term outlook for EVs remains bright,** although by 2040 fewer of the new cars sold are electric compared with our previous outlook**.** Batteries continue to get better and cheaper, leading to improved economics, which underpins long-term growth in EV adoption. EVs reach 56% of global passenger vehicle sales by 2035 and 70% by 2040 in BNEF's

Economic Transition Scenario, down from 73% in the previous outlook. The near-term struggles in the US mean that the country never catches up with China or Europe, and for the first time, trails below the global adoption average for the forecast period.

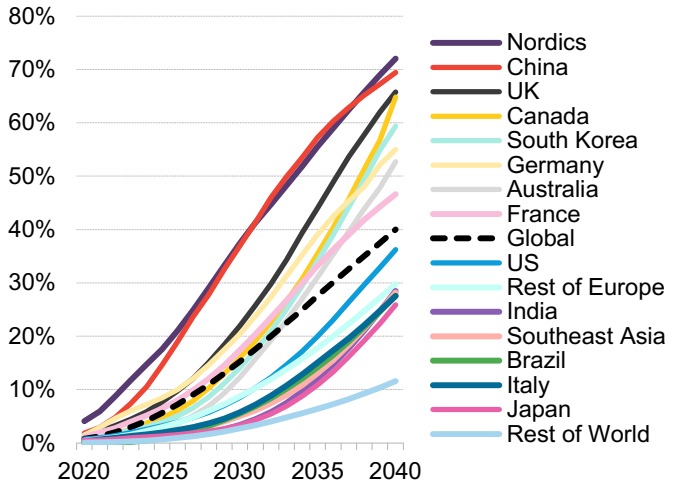
- Despite rapid EV adoption, only 40% of the global passenger-vehicle fleet is electric by 2040 in our Economic Transition Scenario. The fleet electrifies faster than that in several countries, like the Nordics (72%), China (69%), or the UK (66%), but some of the biggest car markets, like the US and Japan, are much lower.

Figure 8: Global long-term passenger EV sales by market – Economic Transition Scenario



Source: BloombergNEF

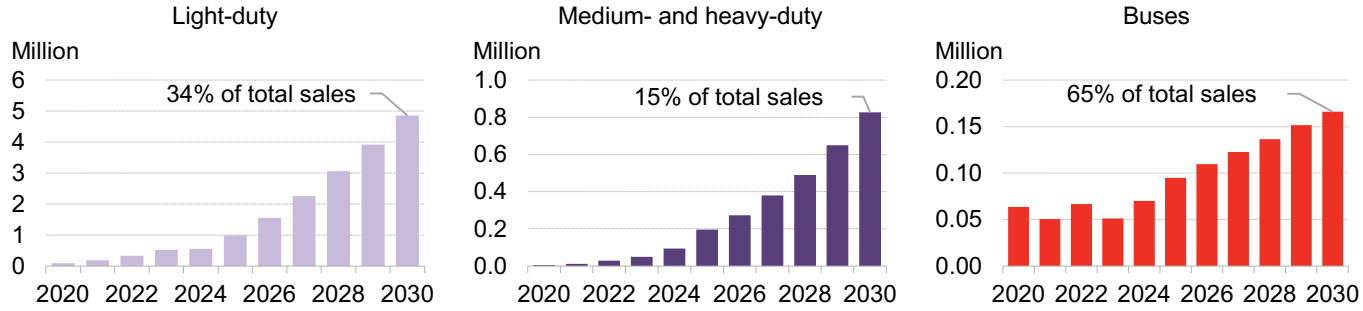
Figure 9: Global long-term EV share of passenger vehicle fleet by market – Economic Transition Scenario



Source: BloombergNEF

- **Electric truck sales are taking off in China**. The elements of a strong market are in place for growth to continue. These include government support, such as scrappage subsidies, better batteries, increased manufacturer competition, declining costs and expanding charging infrastructure. Electric vans and trucks capture 19% of the commercial vehicle market in China in 2025 and 46% in 2030 in this year's outlook.
- **The Chinese market's rapid ascent is in stark contrast to lackluster performance in other large trucking markets.** In Europe, the relaxation of van emission targets slows short-term growth, while standards for heavier trucks have remained in place for now and lend some support to e-truck sales. In the US, policy setbacks and a still immature supply chain for e-trucks hold back the market's expansion outside of some smaller applications.
- **The global market for electric vans just exceeds a third of sales by 2030**. For heavier battery trucks that market share approaches 15%, about a fifth smaller than our previous outlook (Figure 10).
- **The next few years are important for the long-term development of the global electric commercial vehicle market**. The economics of battery-powered vans and trucks improve rapidly and approach those of diesel by 2030 in several countries and for several use cases, including heavy-duty and long-haul operations. That requires controlling input costs, such as for battery cells, and operating expenses, primarily electricity costs. The price of an e-truck is most relevant in these early days, while charging costs relative to liquid fuels gain increased importance over time (Figure 11).

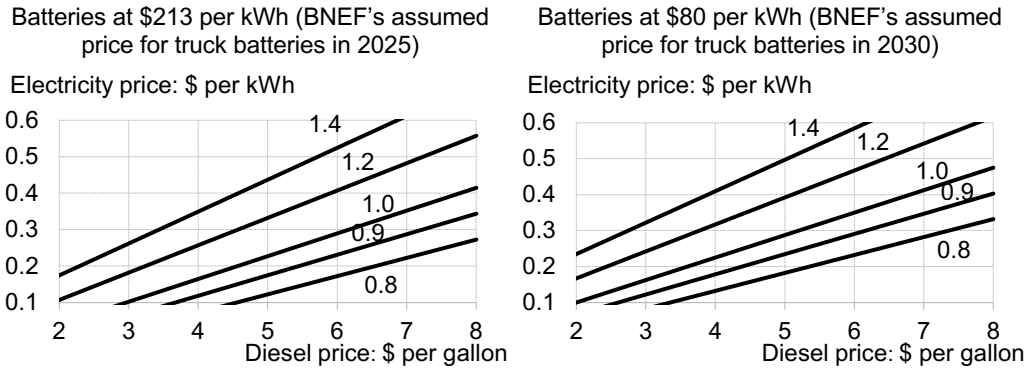
Figure 10: Near-term global sales outlook for electric and fuel-cell vans, trucks and buses



Source: BloombergNEF. Note: Electric vehicles include battery-electric and plug-in hybrid vehicles. Buses include city buses apart from China, which also includes coaches and intercity buses.

- **City bus electrification continues to progress**, with markets like mainland China, the Nordics and South Korea set to have an all-electric bus fleet before 2040 under existing market conditions. Policy support has been the key driver. Europe is mostly on schedule to achieve the EU's 100% zero-emission city bus sales target by 2035. Countries like the Netherlands already reached fully zero-emission sales in the segment last year.

Figure 11: Total cost of ownership ratio of battery electric to diesel heavy-duty, long-haul trucks – 200,000 miles annual distance



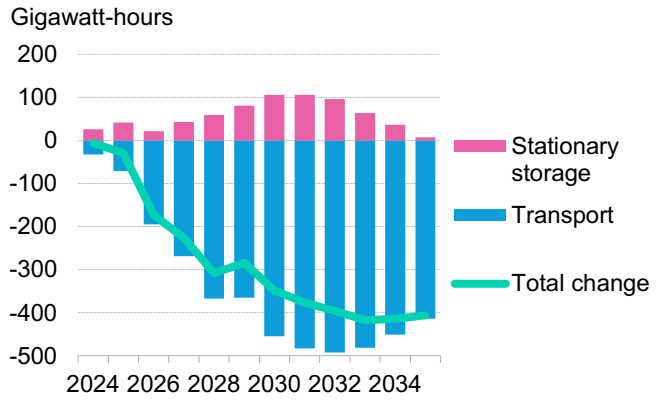
Source: A long-haul diesel truck costs $180,000 and a 500-mile battery-electric vehicle (BEV) costs $350,000 in 2025 and $250,000 in 2030. A diesel truck drives 8 miles per gallon and a BEV drives 0.5 miles per kilowatt-hour (kWh).

- **Despite generous subsidies, hydrogen fuel-cell vehicles have failed to gain meaningful traction in any vehicle segment** due to high costs, poor efficiency, and a lack of consumer interest. Passenger fuel-cell vehicle sales have been falling for three years and only 5,000 were sold in 2024. Fuel cells are now confined to buses in a small number of markets and a few commercial vehicle segments reliant on very generous policy support.
- **Limited uptake in the motorcycle segment holds back faster EV adoption in two-wheelers.** Some 38% of two-wheelers sold in 2024 were electric, driven by growing demand in the moped and scooter segments. Yet, high upfront price premiums and meagre model offerings in the motorcycle segment hold adoption back, and by 2028 only 42% of all two-wheelers sold come with a plug. Falling battery prices and rising penetration of low-cost battery chemistries, such as sodium-ion and lithium iron phosphate, help EV sales grow to 93

million by 2040, or 87% of total sales. By then, nearly half of all two-wheelers on the roads globally are electric.

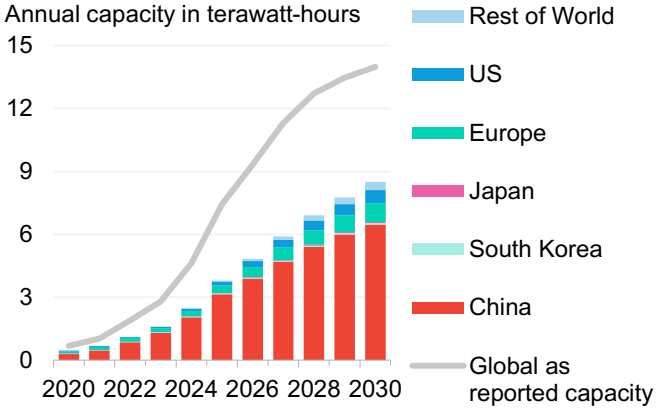
- **Three-wheelers electrify much faster**, with EVs making up more than 80% of all sales in 2024. Commercial entities make up the bulk of three-wheeler buyers and these customers respond quickly to the attractive savings on the total cost of ownership compared with private buyers. By 2040, electric three-wheeler sales hit 21.4 million and the EV share of sales rises to 97%.
- **While battery demand for EVs is still growing, it is lower than in previous outlooks.** Cumulatively between 2024 and 2035, BNEF's battery demand outlook fell 8% compared with last year's outlook, equating to 3.4 terawatt-hours fewer batteries. Most of that, about 2.8TWh, is due to fewer passenger EV sales in the US, where demand is 42% less than in last year's outlook (Figure 12). Lower demand from vehicle segments was slightly offset by stationary storage demand rising by 12%.
- **The battery industry is still grappling with overcapacity, which is driving down battery prices and intensifying competition.** Average utilization of battery plants in China is now below 50%. Planned risk-adjusted lithium-ion cell manufacturing capacity by the end of 2025 is 3.8TWh (Figure 13) – more than double the 1.5TWh global battery demand expected this year. Despite that imbalance, many battery makers continue to announce ambitious plans to expand. Overcapacity in combination with economies of scale and low metal and component prices has pushed global average battery prices for fully electric vehicles below $100/kilowatt-hour. However, battery prices remain above this level in Europe and the US. We expect moderate price declines in the next few years after a big 20% drop in 2024.

Figure 12: Change in annual battery demand by segment compared to BNEF's 2024 Long-Term Electric Vehicle Outlook



Source: BloombergNEF. Note: Transport based on the Economic Transition Scenario and stationary storage based on energy storage forecasts in BNEF's Energy Storage Market Outlooks (web | terminal). Transport includes passenger electric vehicles (EVs), commercial EVs, e-buses and two- and three-wheelers.

Figure 13: Risk-adjusted cumulative lithium battery cell manufacturing capacity by region, compared with as-reported global capacity

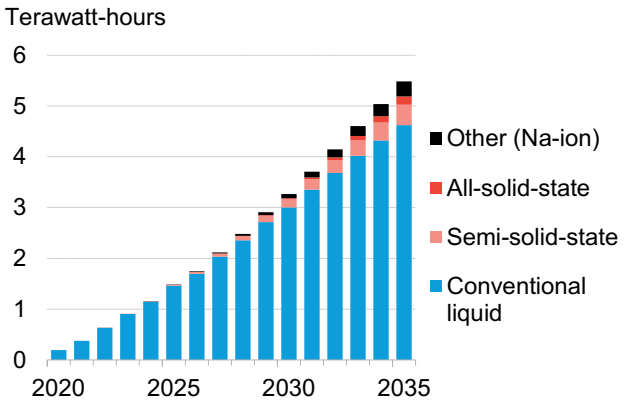


Source: BloombergNEF. Note: As-reported capacity data up to 2024 includes fully commissioned capacity. As-reported capacity from 2025 onward includes announced, under-construction and fully commissioned capacity. Regional data uses BNEF risk-adjustment methodology. Data as of May 21, 2025.

- **Solid-state batteries are expected to account for 10% of global EV and energy storage battery demand by 2035, based on BNEF's new outlook** (Figure 14)**.** These next-generation batteries offer significant advantages in safety and energy density and are

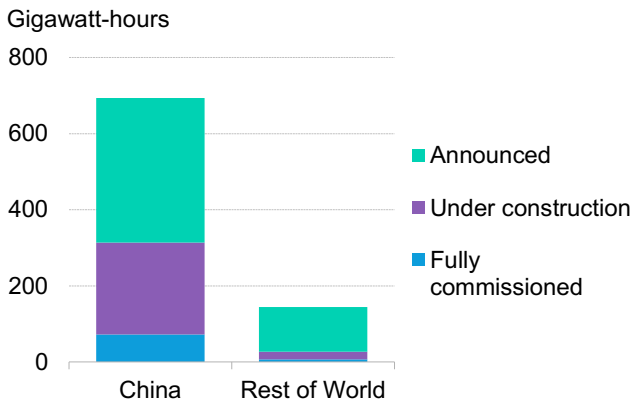
expected to be used in high-performance premium vehicles. However, the exact path to commercialization and mass production remains uncertain. Only 9.5% of announced manufacturing capacity for solid-state batteries is fully commissioned, with most facilities located in China and focused on semi-solid technologies (Figure 15).

Figure 14: Battery demand for EVs and stationary storage by electrolyte chemistry under base-case scenario



Source: BloombergNEF. Note: Na-ion refers to sodium-ion.

Figure 15: Current and planned manufacturing capacity for solid-state battery cells



Source: BloombergNEF, company filings. Note: Data as of May 19, 2025. Manufacturing capacity is non-derisked nameplate manufacturing capacity.

- **The impact that autonomous vehicles could have on transport is becoming clearer.** After a decade of promises, autonomous-vehicle technology is starting to contribute meaningfully to the transport mix as robotaxis from companies like Waymo, Baidu, Zoox, WeRide and Pony AI are being deployed in tightly geofenced urban environments. In our outlook, by 2035, the global robotaxi fleet reaches nearly 6 million vehicles, or 0.4% of the 1.6 billion passenger vehicles on the road in that year, however, due to the high annual mileage of these vehicles they account for nearly 2% of passenger vehicle kilometers in that year.
- **EVs are now a meaningful source of electricity demand.** EVs in China consumed more electricity than the whole of Sweden in 2024 and global EV electricity demand continues to rise quickly in our outlook. The demand from passenger and commercial EVs, e-buses and electric two- and three-wheelers is expected to increase 2.4 times between 2025 and 2030, and eightfold from 2025 to 2040 as the electric vehicle fleet grows.
- **EVs account for 11% of global electricity demand by 2050** and peak at around 16% of annual grid investment in the mid-2030s. This will differ by region. In the UK, EVs account for 20% of electricity demand by 2040, whilst in China they are just 9%, despite the advanced EV adoption in the country. Holiday travel and cold weather, which causes the efficiency of EVs to drop, will contribute to peak charging-demand days.
- **Smart charging activity is picking up.** The value of smart charging and potential vehicle-to-grid revenue look to be greater in markets like China, where EVs account for a smaller share of total electricity demand. This is because there is a bigger overall electricity market for them to play in and revenue saturates more slowly when the energy storage available in the EV fleet gets used by the power system.

Figure 16: Global electric vehicle electricity demand in the Economic Transition Scenario

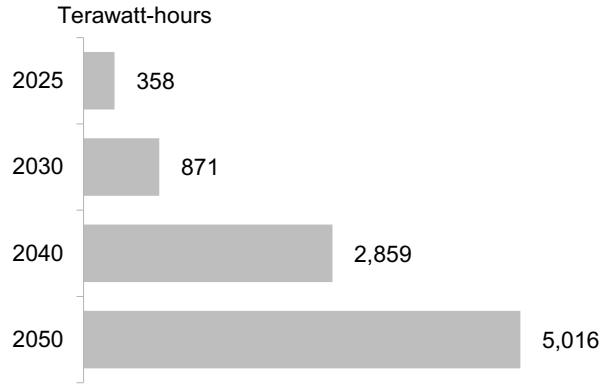
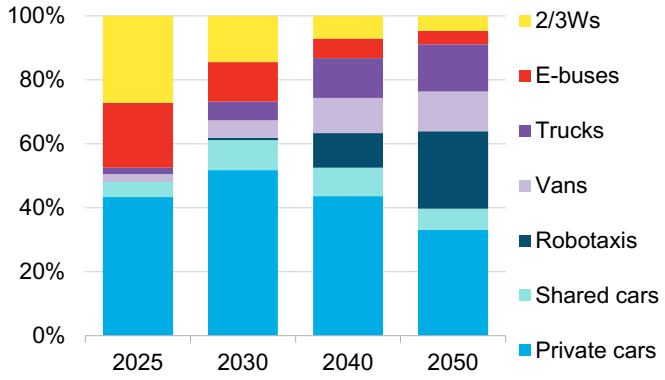


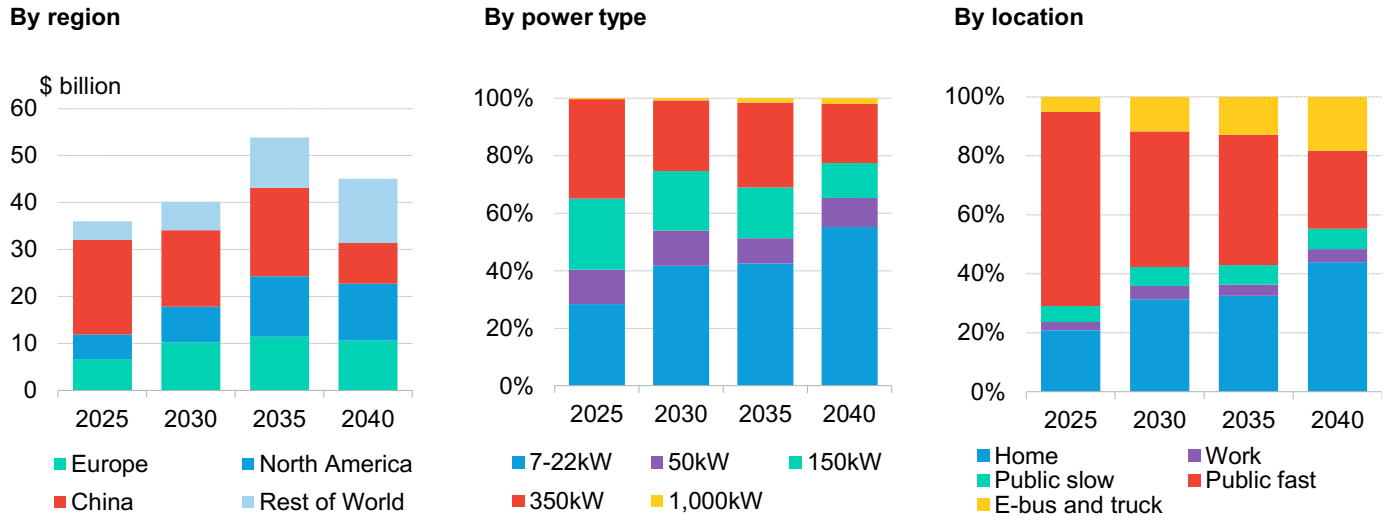
Figure 17: Share of global EV electricity demand split by vehicle segment in the Economic Transition Scenario



Source: BloombergNEF. Note: vans refer to light commercial vehicles. Trucks refer to medium- and heavy-duty commercial vehicles. 2/3W refers to two- and three-wheelers.

- **EV charging is evolving** from a small, crowded marketplace of hardware manufacturers, software providers, site operators and developers, into one that will serve a significant portion of global electricity demand and will require almost $900 billion of investment by 2040. Direct current (DC) fast chargers account for almost 70% of annual investment in 2025, as funds flow to build the public charging network, but by the late 2030's alternating-current (AC) chargers take the largest portion of investment.
- **The EV fleet overtakes the size of the ICE fleet in many countries starting with Norway in 2030** and then regions like China in 2033, California in 2037 and Germany in 2039. This drives revenue from public charging in Europe and North America up 22-fold from $10 billion in 2025 to $220 billion in 2040. The growth is an opportunity for new entrants to the charging market but it is an existential threat to traditional fuel retailers.

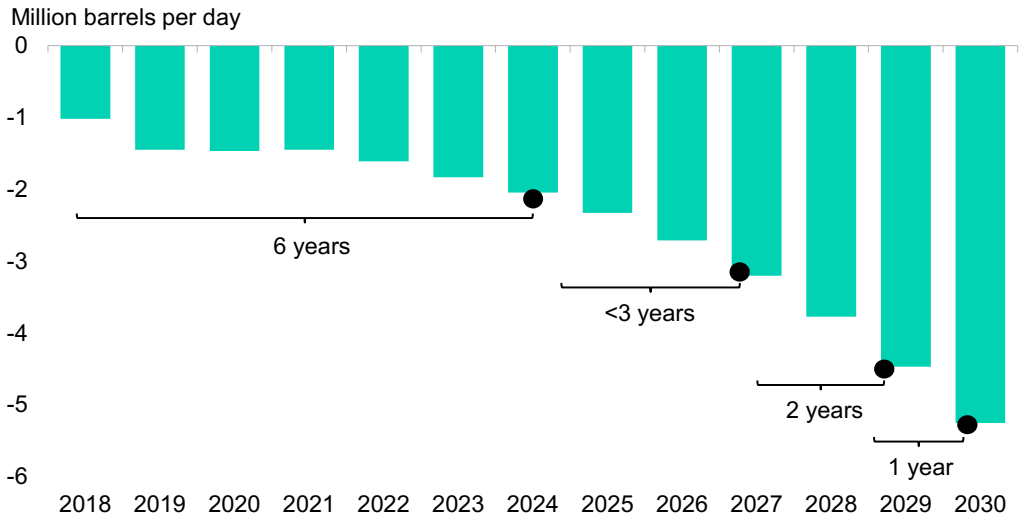
Figure 18: Share of annual EV charging infrastructure investment – by region, hardware type and location



Source: BloombergNEF. Note: Excludes two- and three-wheelers. Includes hardware, installation and maintenance costs. In the power type chart, kW refers to kilowatts.

- **The slow rollout of charging infrastructure in the US could further delay EV adoption.** The US requires annual public charging installations to more than triple over the next five years and increase more than eightfold between 2030 and 2034.
- **Commercial vehicle charging is becoming an increasing focus for policymakers** and charging companies as billions in government funding flows into the sector. Uncertainty about the success or potential failure of new technologies such as higher power charging, smart charging, wireless charging and battery swapping is reflected in our outlook. Many of the companies fighting for market share today will not survive the shake-out.
- **As the share of EVs in the fleet grows, the impact on the oil market is increasing – notably in markets like China and Europe**. By the end of 2026, an incremental 1 million barrels per day of oil will be displaced globally compared to 2024 – that is about the same amount as Malaysia consumes in total. The first million daily barrels per day of oil displacement occurred in 2018 and it took six years to displace the next million. By 2030, road fuel consumption would have been 5.3 million barrels per day higher had every kilometer driven by EVs been driven with an ICE vehicle.

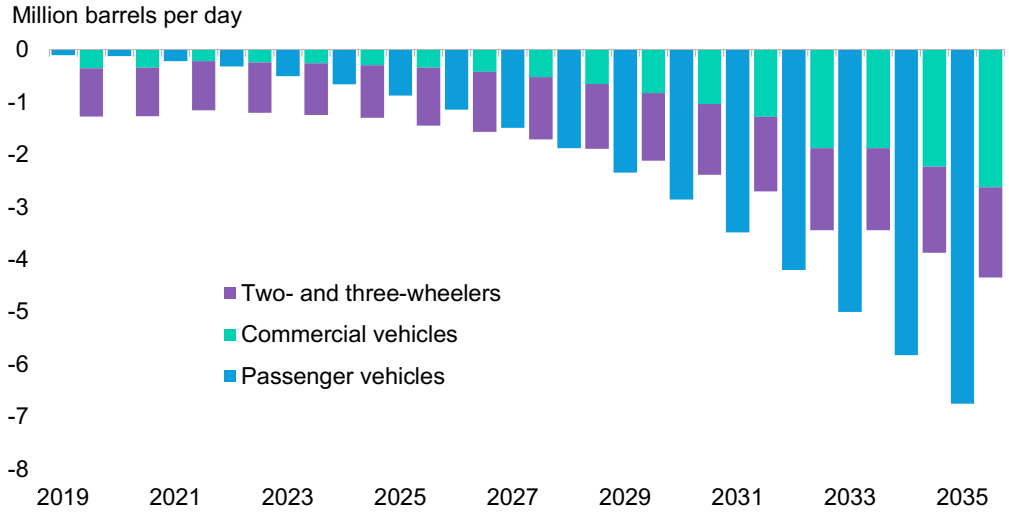
Figure 19: Displacement of global road-fuel demand and the time taken to avoid a million barrels per day of consumption in BNEF's Economic Transition Scenario



Source: BloombergNEF. Note: The annotated period indicates the estimated duration in years required to displace a million barrels of road fuel demand.

- **Passenger cars displace the most oil demand from 2026.** Oil demand avoided by passenger cars exceeds that for any other vehicle segment in 2026 and all the other segments combined in 2029. This total gap reaches over 1 million b/d by 2032 as passenger cars lead the transition in the sector.

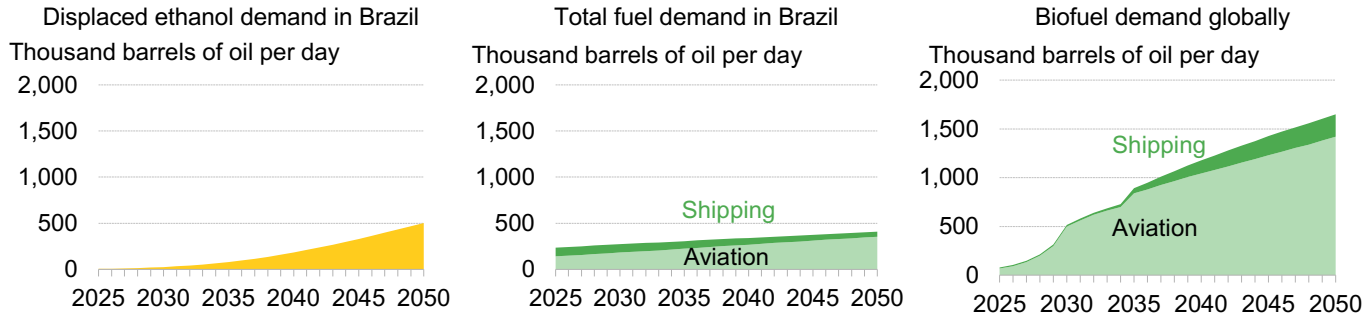
Figure 20: Annual road-fuel demand displacement in BNEF's Economic Transition Scenario, by vehicle type



Source: BloombergNEF. Note: Commercial vehicles include trucks and buses.

- **Electrification presents a strategic dilemma for Brazil**, as the declining costs of electric passenger cars are set to upend the country's ethanol market. The EV fleet in the country displaces half a million barrels per day of ethanol demand by 2050 in the ETS – which is close to 80% of the country's ethanol consumption in road transport in 2024. Aviation and shipping could be new sources of demand for displaced ethanol, with volumes enough to cover close to a third of global requirements in these sectors. Yet, tapping into higher value products, like SAF, is challenging as early-stage technologies, high costs and sometimes disparate global policies could be difficult to navigate.

Figure 21: Displaced ethanol demand from EVs in Brazil, and biofuel demand in aviation and shipping



Source: BloombergNEF. Note: Displaced ethanol is from EV adoption. Aviation fuel demand has been adjusted to account for the efficiency of Alcohol-to-Jet process for which BNEF assumes 1.7 barrels of ethanol produces 1 barrel of jet fuel.

- **Annual investment in battery metal mines and refineries jumped 80% in 2024**, as measured by the capex associated with mining and refining facilities coming online in that year. This is the biggest annual leap in investment recorded since we started tracking data. Actual investment was $29 billion, which is equal to the investment required in 2026, the peak annual spending required to bring upstream battery supply chains in line with BNEF's Net Zero Scenario. This means that maintaining the current annual rate of investment in battery metals capacity would be sufficient to put supply on track for the Net Zero Scenario.

- These figures are the realization of investment decisions made earlier in the decade, when the sector was facing supply shortages as demand for battery metals rose. However, slower-than-expected demand has resulted in battery metal markets being heavily oversupplied, which pushed down prices over the course of 2024. A series of furloughs and cancellations have been imposed by several producers seeking to weather difficult market conditions.
- **While demand growth has slowed in the near-term, the long-term growth for battery metals remains strong**. Overall battery metals demand increases significantly as electric vehicles are adopted more quickly across all segments. The mass of metals going into lithium-ion batteries rises to 53 million tons by 2040, from 12 million tons in 2025, in order to get on track for net zero by mid-century. Copper, aluminum and lithium form the largest part of this total by weight. In 2040, the lithium-ion battery industry requires 15 million tons of copper under the NZS, 7 million tons of lithium and 12 million tons of aluminum.

Figure 22: Required investment in cobalt, nickel and lithium capacity under BNEF's Net Zero Scenario, compared with 2024 actuals

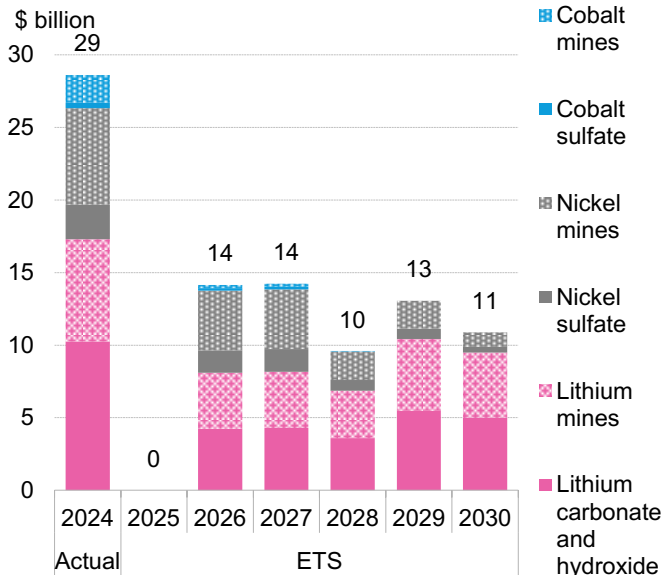
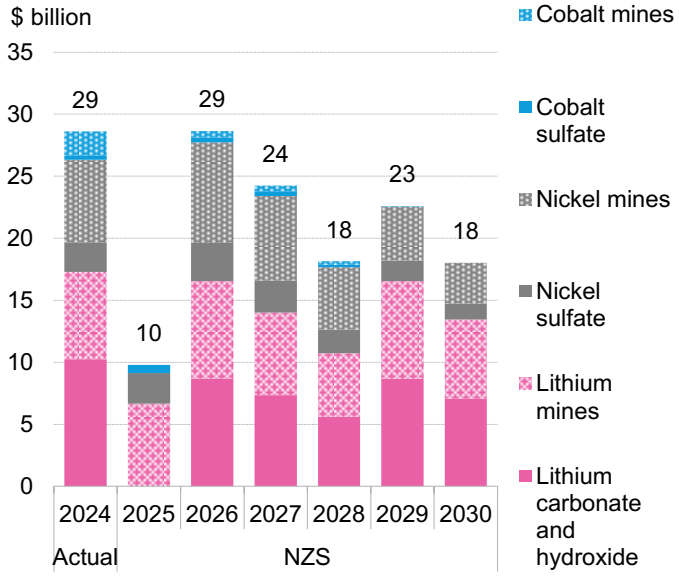


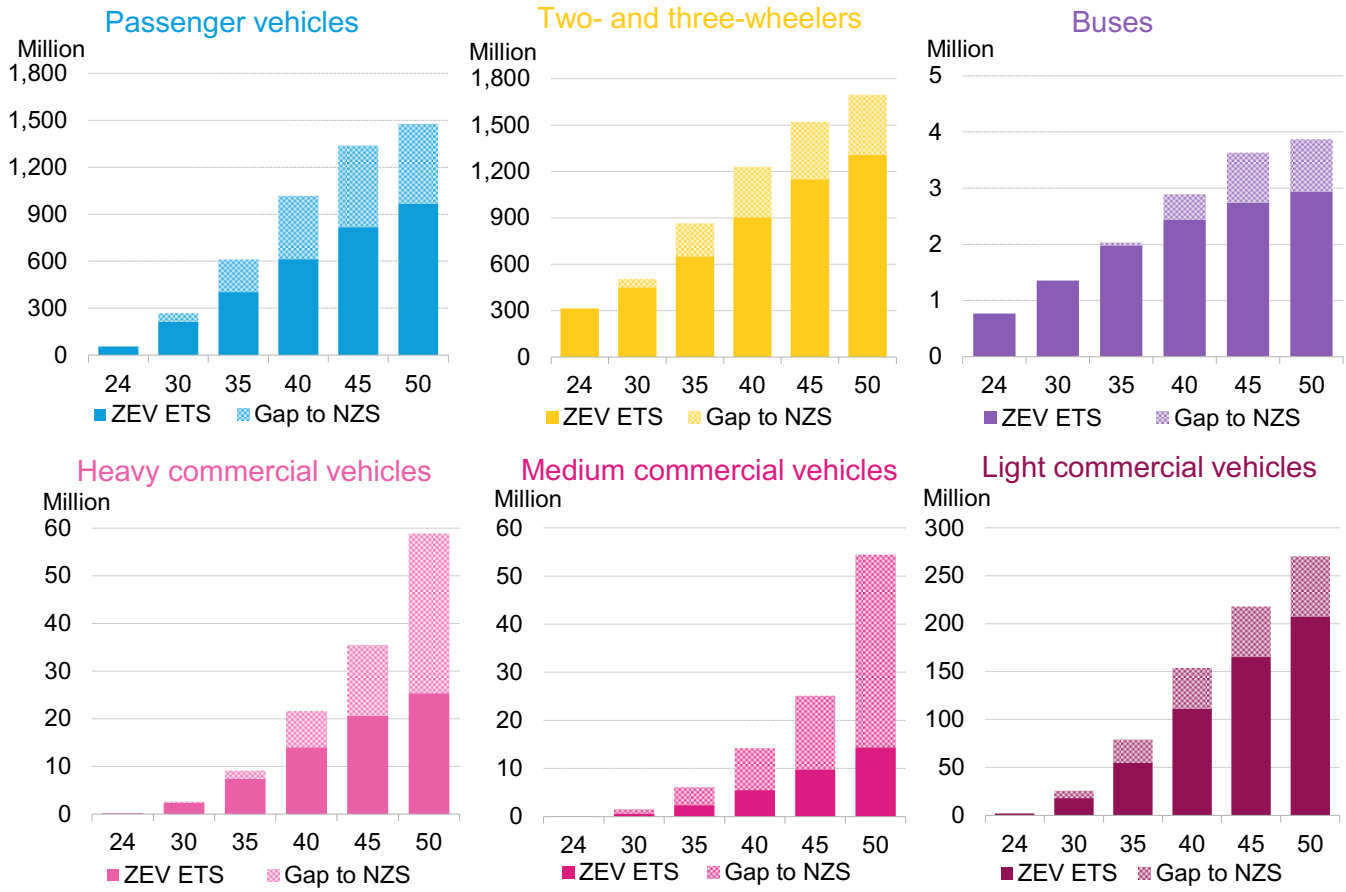
Figure 23: Required investment in cobalt, nickel and lithium capacity under BNEF's Economic Transition Scenario, compared with 2024 actuals



Source: BloombergNEF. Note: Chemical compounds refer to refining plants required to process them. Nickel is of the battery-grade variety that feeds into Class 1 smelters. NZS refers to BNEF's Net Zero Scenario, a pathway to net-zero emissions by 2050. ETS refers to the Economic Transition Scenario. Years with zero required investment represent those in which existing manufacturing capacity is enough to meet global demand.

- The Net Zero Scenario outlined in this report remains a daunting challenge and will require significant policy intervention in the years ahead. Some vehicle types, like two- and three-wheelers and buses, are on a positive trajectory for a zero tailpipe-emissions capable fleet by 2050. However, globally, there is still a deficit of 500 million electric passenger vehicles, 380 million electric two- and three-wheelers and 78 million electric and fuel-cell trucks and buses between the Net Zero Scenario and the Economic Transition Scenario in 2050.

Figure 24: Global electric vehicle fleet in the Economic Transition Scenario and the gap to meet Net Zero Scenario



Source: BloombergNEF. Note: ZEV refers to zero-emission vehicles. ETS is BNEF's Economic Transition Scenario and NZS is the Net Zero Scenario.

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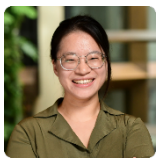

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